



Filing ID #10020141

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Bibiana Boerio
Status: Congressional Candidate
State/District: PA14

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 04/11/2018
Period Covered: 01/01/2017– 03/31/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ford Motor Company Death Benefit		\$100,001 - \$250,000	None		
Ford Motor Company Defined Plan		Undetermined	Pension	\$15,001 - \$50,000	\$100,001 - \$1,000,000
NY Life		\$100,001 - \$250,000	Annuity Payments	\$2,501 - \$5,000	\$5,001 - \$15,000
PNC Checking & Savings		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Sallie Mae		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Schwab Charitable Gift Fund SCGC1		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Schwab IRA xx20 ⇒ Cash Bank Sweep		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA xx20 ⇒ DFA US Large Cos (DFUSX)		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA xx20 ⇒ Metropolitan West Tot Return (MWTIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx20 ⇒ Schwab International		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx20 ⇒ Vanguard Short-term Bond (VBIRX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx20 ⇒ Vanguard Total Bond (VBTIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ AQR Equity Market Neutral (QMNIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Brown Cap Mgt Small Co (BCSSX)		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Cash Bank Sweep		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA xx46 ⇒ DFA Large US Cos (DFUSX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ DFA US Large Cap Val (DFLVX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Fidelity Total Bond (FTBFX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Ford Motor Company (F)		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Harding Loevner (HLMIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Hartford International (HILYX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Loomis Sayles BF (LSBDX)		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA xx46 ⇒ Metropolitan West Tot Ret (MWTIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Schwab International		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Undiscovered Managers (UBVLX)		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Vanguard Dividend Growth (VDIGX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Vanguard ST Bond (VBIRX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Vanguard Total Bond (VBT LX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA xx46 ⇒ Versus Cap Management (VCMIX)		\$100,001 - \$250,000	Tax-Deferred		
Schwab Rev Trust xx17 ⇒ Cash Bank Sweep Account		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Rev Trust xx17 ⇒ Fidelity Blue Chip (FBGRX)		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Rev Trust xx17 ⇒ Fidelity Capital & Income (FAGIX)		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Schwab Rev Trust xx17 ⇒ Fidelity Mid-Cap Stock (FMCSX)		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$2,501 - \$5,000
Schwab Rev Trust xx17 ⇒ Ford Motor Company (F)		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Schwab Rev Trust xx17 ⇒ Kennametal Inc. (KMT)		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Rev Trust xx17 ⇒ Vanguard Balanced Fund (VBIAX)		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Rev Trust xx17 ⇒ Vanguard LTD Term Tax (VMLUX)		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Rev Trust xx58 ⇒ Berryessa CA UN SD		\$15,001 - \$50,000	Interest	None	None
Schwab Rev Trust xx58 ⇒ Brazosport Water Author Muni Bond		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Cash Bank Sweep		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Rev Trust xx58 ⇒ Center Grove, IN Muni Bond		\$50,001 - \$100,000	Interest	\$1 - \$200	\$2,501 - \$5,000
Schwab Rev Trust xx58 ⇒ Franklin IN MSBC		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Harris County, TX Muni Bond		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ NY State Dorm Authority Muni Bond		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Pennsylvania ST		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Sedgwick CNKS		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Sewickly PA Muni Bond		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ St. Charles Parrish, LA Muni Bond		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Washington St		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Schwab Rev Trust xx58 ⇒ Waunakee County SD		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1,001 - \$2,500
US Savings Bonds		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Ford Motor Company	Related to Prior Year Foreign Tax Settlements	N/A	\$8,337.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Express	Summer 2017	Expenses related to U.S. and European travel	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Treasurer (non-paid volunteer)	Adelphoi USA
Board of Trustees (non-paid Volunteer)	United Way of Westmoreland County
Secretary-Treasurer (non paid volunteer)	Wimmer Commons Home Owners Associaton
Chairman (non-paid Volunteer)	Greensburg Central Catholic High School Advisory Council
Member of Board of Trustees (non-paid volunteer)	Saint Vincent College, Latrobe PA
Member of Board of Trustees (non-paid volunteer)	Lourdes University, Sylvania OH
Member of Advisory Board (non-paid volunteer)	University of Pittsburgh School of Business
Member of Advisory Board (non-paid volunteer)	Berg Center of University of Pittsburgh School of Business
Member of Board of Trustees (non-paid volunteer)	Greater Latrobe School District Conservation Trust

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Schwab IRA xx20
- Schwab IRA xx46
- Schwab Rev Trust xx17
- Schwab Rev Trust xx58

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Bibiana Boerio , 04/11/2018